Exploring the gap between attitudes and behaviour

Understanding why consumers buy or do not buy organic food

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Abstract

Purpose – The purpose of the paper is to explore the values that underlie consumers purchasing decisions of organic food.

Design/methodology/approach – The paper draws on data from focus groups and laddering interviews with a total of 181 regular and occasional consumers of organic food that were contrasted with survey results of other studies.

Findings – The results show that most consumers associate organic at first with vegetables and fruit and a healthy diet with organic products. Fruit and vegetables are also the first and in many cases only experience with buying organic product. The decision-making process is complex and the importance of motives and barriers may vary between product categories.

Research limitations/implications – While further research would be required to facilitate full understanding of the consumer-decision making process with regard to organic produce, this work indicates the complexity of the process and the likelihood of variation between different product categories. Future research should consider tradeoffs that consumers make between values and product as well as consumer segmentation.

Originality/value – Prior research concerning the consumer decision-making process with regard to organically produced food is limited. Theses findings have implications for future sector-based communications to consumers and, potentially, for product development and labelling.

Keywords Organic foods, Purchasing, Consumer behaviour, United Kingdom

Paper type Research paper

Introduction

The UK has one of the leading organic markets in Europe and worldwide with an estimated value of £1.2 billion in 2003 or, about half the size of the leading European market for organic food, Germany (SA, 1999; Richter and Padel, 2005).

Financial support of the EU for the OMIARD project is gratefully acknowledged. The authors would also like to thank all our project partners in OMIARD that helped develop the methods, and all participants and their colleagues who helped with organising and conducting the field work in various locations, Peter Midmore, Catherine Seymour, Sensory vision in Reading, Hilke Barghaus, Michaela Bahr and Pascal Desmond.
Certified organic land area in the UK has also increased considerably over the last few years, but in 2003 declined for the first time from 724,523 in 2002 to 695,619 ha. This is likely to be a reflection of changes to certification requirements in Scotland – all producers are now required to certify both land and stock, whereas before livestock could be exempt. However, it could also be a reflection of problems that organic producers experienced in the market particularly in relation to milk and meat, where, depending on product type, only 60 to 80 per cent of organic production is sold under organic labels with the remainder going into conventional channels (Hamm and Gronefeld, 2004). Although demand for organic food is still buoyant, there are signs that markets are maturing and growth rates over the last few years have slowed to below 10 per cent (Firth et al., 2004; MINTEL, 2003; Organic Monitor, 2001; Organic Monitor, 2002; Smith and Marsden, 2004; SA, 1999). Smith and Marsden (2004, p. 355-356) have suggested that the slow down might be placing limits on the potential of organic farming to act as a “panacea for the problems of rural economic development”. Like other authors before them who have supported a shift away from purely production-based subsidies (e.g. Hamm and Michelsen, 1996; Hamm and Gronefeld, 2004; Dabbert et al., 2004), they conclude that a lack willingness of policy makers to intervene in the supply chains in the UK has led to peculiar mix of government production support with retailer-led private interest regulation of the rest of the supply chain. They argue that it is necessary to go beyond the trends charted by the statistics and examine in greater detail the evolving construction of limits both in production and consumption.

In relation to growth potential of consumer demand and its limits, many surveys have identified and ranked motivations for buying organic food and have generally painted a positive picture of robust demand, confirming the growth witnessed in the value of the retail market throughout the 1990s and into the twenty-first century (e.g. MINTEL, 2000; SA, 1999). However, the observable slow down in market growth may indicate a discrepancy between an evident willingness to buy, captured by these surveys, and actual purchasing behaviour (Makatouni, 2002). Zanoli et al. (2004) also talk about differences between the perceived organic consumer and the actual organic consumer. On this basis, it is necessary to be cautious of the very positive conclusions that some studies reach.

Drawing on the results of in-depth research on consumer attitudes to and perceptions of organic food, this paper explores the values that underlie consumers purchasing decisions. The first section includes an overview of recent surveys and other literature on organic food and the consumer, followed by an introduction to the method and results of our empirical research with consumers in England and Wales using focus groups (96 participants) and laddering interviews (85 responses). In the discussion section we explore links and discrepancies between attitudes and behaviour and suggest strategies to understand better the consumption of organic food.

Organic food and the consumer
The retail market has grown from an estimated £605 million in 1999 to £1.1 billion in April 2004 (SA, 1999). The development of the organic sector in the UK has been largely driven by three factors:
Growing consumer demand has been attributed to a response to various food-scares including widespread concern and resistance to the introduction of genetically modified organisms in the food chain (MINTEL, 1999; SA, 1999; Farodoye, 1999; Michelsen et al., 2001). Leading UK market intelligence companies have regularly surveyed purchasing of and shoppers’ attitudes to organic food in the UK using nationally representative samples (e.g. Datamonitor, 2002; MINTEL, 2003; MORI, 1996; TNS, 2004). The surveys have covered a number of issues, such as socio-demographic aspects and shopper typology, frequency, availability and place of purchase, motivations and perceptions, barriers, and information about organic labels (summarised in the following section) supplemented by panel data in relation to actual purchasing behaviour of consumers in relation to organic food (TNS, 2004; SA, 1999).

Who is the organic shopper?

A MORI poll in 1999 found that one third of the public buy organic food (SA, 1999). In an NOP poll in August 2004 this had increased to 77 per cent of all households buying some organic products (SA, 1999).

On the basis of a TNS survey, the Soil Association (SA, 1999) provided a detailed breakdown of organic shoppers into eight categories, according to frequency of purchase and the number of product categories bought. “Frequent” organic shoppers were generally older, more affluent and had fewer children than the average UK shopper. Two-thirds of frequent organic shoppers belonged to socio-economic groups A, B, C1, compared to under 50 per cent in the population. However, people who are among the highest spenders on organic food were on average more affluent and younger.

In contrast, the MINTEL (2000) survey found youngest and oldest age groups least concerned with organic, reflecting a lower emphasis on health and diet. Organic purchasing grows as consumers reach their 30s and have no children. More affluent families and those with children that have left home have more disposable income to buy organic food. However, it was concluded that with improved supply, the profile could spread down the socio-economic scale. Based on a NOP World survey of a representative sample of 1,057 adults, the SA, 1999, 2000, 2001, 2002, 2003, 2004 claimed that the appeal of organic food is broadening to include a wider spread of social groups. MINTEL (2003) claims that organic meat and fruit have become more popular and differentiates between consumers of organic vegetables and other categories. The most common purchasers of organic vegetables are 45-54 year olds, whereas the youngest age group is the least likely of all demographic groups to purchase organic vegetables.
How much do they spend?

Data from TNS panels (published in SA (1999, 2000, 2001, 2002, 2003, 2004)) show that despite slowing growth, the frequency of purchase and average spend of organic consumers has continued to increase in the last two years. In the year ending June 2004, the average organic consumer bought organic food 13.6 times per year, compared with 12.8 times per year in 2002 and the average spend per household increased to £59.39, compared with £32.44 in 2002. However, 84 per cent of all organic purchases are made by only 25 per cent of all customers buying organic food, i.e. the market depends on a small number of committed organic shoppers (TNS, 2004).

Several surveys found a pronounced North/South divide in the organic sector with demand steadily diminishing northwards (e.g. MINTEL, 2000). For example, spending of “heavy” organic shoppers was found to be skewed towards the South East and London (TNS, 2004).

Most organic food in the UK continues to be bought in supermarkets, although direct sales of organic food have seen higher than average growth in the last two years (16.2 per cent compared with 10 per cent on average). Despite slower than average growth in the last two years, multiple retailers remain, with a share of 80 per cent of all sales, the most important outlets for organic food in the UK. The stores most active in marketing organic foods and stocking the widest range are concentrated in southern England, and availability of organic produce tends to be less in other regions.

Attitudes and motives to buy organic

According to MINTEL (2000), the term “organic” and organic labels have strong emotional resonance with consumers in terms of personal wellbeing and health and in the wider context of benefits to the environment. In various surveys, personal health remains a strong motivating factor for the purchase of organic food (e.g. Datamonitor, 2002). Over the years, the Soil Association has published several surveys of consumers’ reasons for buying organic food, which are contrasted in Table I. Slight changes in the wording of the attitude statements make a direct comparison between the surveys difficult but illustrate an overall increase in agreement with various statements about organic food. The main driving force behind expected health benefits could be the absence of residues, but altruistic motives (such as concerns for the environment and animal welfare) are becoming more important. A recent survey by MINTEL (2003) suggested that concerns about food safety remain important for consumers, but that in the absence of major food scares in the last two years these drivers have arguably been less important; this could in part explain the slow down of growth in the organic retail

<table>
<thead>
<tr>
<th>Reason</th>
<th>1999 MORI (%)</th>
<th>2002 TNS (%)</th>
<th>2004 NOP1:1 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>No chemicals/additives/pesticides</td>
<td>59</td>
<td>68</td>
<td>78</td>
</tr>
<tr>
<td>Better for the environment/better for wildlife</td>
<td>28</td>
<td>59</td>
<td>78</td>
</tr>
<tr>
<td>Personal health/it is better for me/my family</td>
<td>53</td>
<td>49</td>
<td>66</td>
</tr>
<tr>
<td>Tastes better</td>
<td>43</td>
<td>34</td>
<td>48</td>
</tr>
<tr>
<td>GM free</td>
<td>30</td>
<td>N/a</td>
<td>74</td>
</tr>
<tr>
<td>Higher animal welfare</td>
<td>24</td>
<td>50</td>
<td>N/A</td>
</tr>
</tbody>
</table>

**Table I.** Development of consumer motives for organic food in the UK

**Sources:** SA (1999, 2003, 2004)
market. MINTEL (2003) see animal welfare and environmental concerns remaining important as secondary drivers of the market.

McEachern and Willock (2004) identify four key factors in consumer attitudes to organic meat in an analysis of postal questionnaires: meat safety, animal welfare, quality assurance and media topics – but highlight that this cannot be generalised in relation to other product categories. The 2002 TNS survey provides some indication that motives change as purchasing frequency increases, with heavy shoppers taking on board a greater number of issues. Motives can also vary depending on what category of product is purchased (TNS, 2004).

In addition to the structured survey data presented above, consumer attitudes to organic food have also been explored in a small number of qualitative studies, mainly outside the UK (e.g. Nielsen et al., 1998; Torjusen et al., 2001). Similar to the quantitative surveys, reasons for buying organic food revolve around the issues of health and environmentally sensitive production methods and are generally contingent on convenience, availability and cost. “Naturalness” of the product also emerges as a factor, but is interpreted in a variety of ways, e.g. animal welfare and non-use of agrochemicals (Lockie et al., 2002; McEachern and Willock, 2004). In studies carried out in Greece, for example, health is not the overriding motive that it is in the UK and other northern European countries, and issues of food quality and “eating to enjoy” (derived from the organoleptic qualities of organic food) emerge as important driving forces in both Greece and Italy (Fotopoulos et al., 2003; Zanoli and Naspetti, 2002).

**Barriers**

Price continues to be cited as the main reason for not buying organic food, despite a slight shift in this trend recently (MINTEL, 1999, 2000; SA, 1999, 2003). Multiple retailers have experimented with initiatives to discount prices, but no scientific studies into the effect of such promotions could be identified. Other barriers include lack of information, poor presentation (e.g. the amount of packaging used; uninviting displays in the shops) and availability (Makatouni, 2000; MINTEL, 2000). In 1999, 26 per cent of consumers in Wales did not know where to find an organic product and a further 35 per cent found it difficult. Analysing the data in relation to purchasing frequency, the study concluded that lack of availability was one reason preventing people from buying organic food in more marginal regions of the UK. MINTEL (2003) refer to improved accessibility of organic products since the multiple retailers have greatly increased the range of products they stock, but the research does not differentiate between different regions of the UK.

**Knowledge and information**

TNS asked 4,000 households in 2002 how they would identify an organic product. A total of 52 per cent claimed that they look for the word “organic” on the label (SA, 1999, 2000, 2001, 2002, 2003, 2004). This supports the conclusion of MINTEL (2000) that the best-known brand in the UK is probably the word “organic” itself rather than specific certification labels. UK consumers, unlike their continental counterparts, do not look for and are not familiar with the various organic labels and compared with other European countries relatively few organic brands exist in the UK (MINTEL, 2000). However, about one-third of respondents of the 2002 TNS survey did not know how to correctly identify an organic product: 21 per cent “didn’t know” and 11 per cent would
look for the word “natural”. This casts doubts on the results in terms of frequency of purchase based on self-classification by consumers. In addition, according to focus group research, both buyers and non-buyers would like to be better informed and would appreciate more supplementary information about the organic certification process when they make a purchase (Makatouni, 2002).

In summary
Many attempts have been made to develop a typography of organic shoppers, and key reasons for buying or not buying organic food are well documented. Regular consumers tend to be educated, affluent and of higher social class, but age profiles vary slightly between different studies. They buy organic products because they perceive them to contain no pesticide residues and to be better for their own health. Of continuing importance to them are ethically-based motives relating to the environment and animal welfare. However, this largely positive attitude stands in stark contrast to the size of the organic food market which accounts for only 1.2 per cent of the food retail market in the UK (SA, 1999). Few attempts have been made to explore whether the motives and barriers identified apply equally to product categories that have only recently become more widely available, such as organic meat.

Research exploring underlying values and other factors influencing purchasing intentions such as availability and convenience remains limited. Some authors refer to the complexity of the decision-making process of consumers and it will be influenced and determined by their attitudes, preferences and socio-demographic or socio-economic profile; they will make trade-offs accordingly. Those who consume organic food on a regular basis face the same “barriers” of price, convenience etc. as others, but more often opt in favour of organics as opposed to their non- or occasional-buying counterparts (Torjusen et al., 2001; Lockie et al., 2002). This is confirmed by one qualitative study of parents’ attitudes to organic food in the UK which found no difference in general perceptions between regular and non-buyers in relation to product quality (no chemicals), production method (natural, home grown) and product value (safety and health). The non-buyers were more sceptical regarding some claims made for organic food (e.g. health benefits, superior taste) and consider themselves to be less able to afford it, whereas the families that bought organic food had at least one child suffering from asthma or food allergies and considered themselves to be better off (Makatouni, 2002). This raises the question of whether the major barrier “price” is related to scepticism surrounding justification for a premium among non-buyers, who are uncertain or doubtful about various claims made for organic food. This paper seeks to explore in greater depth the underlying values of the purchasing decision and the circumstances in which decisions are taken. It focuses on whether positive perceptions and opinions of organic food can be turned into purchasing reality and considers how a larger body of non-buyers could be reached.

Empirical research approach
The paper draws on focus groups and laddering interviews with UK consumers that were carried out as part of a wider study of consumer behaviour in Europe covering eight countries: Austria, Denmark, Finland, France, Italy, Switzerland and the UK[1]. A summary of the EU-wide data relating to consumers was published by Zanoli et al. (2004).
Focus groups

Focus groups are a qualitative method, giving importance to each individual voice, encouraging dialogue in the group and listening to individual concerns (Saumure, 2001), but not aiming to obtain data on representativeness of a particular position. In carefully prepared discussions (90 to 120 minutes) with six to 15 participants the researchers aim to learn about the perceptions, feelings, attitudes, values and ideas of the participants in a defined area of interest (Calder, 1977, cited in Kahan, 2001; Zanoli et al., 2004). Historically, focus groups can be traced back to Merton in the 1930s, who worked with non-directive group interview techniques and soon found that people were most revealing when they found themselves in a safe, comfortable place with individuals like themselves (Saumure, 2001). Focus groups represent one of the most widely used techniques in market research. Since the mid 1980s they have become re-accepted as a valuable method in academic research, including the area of policy research (Saumure, 2001; Kahan, 2001).

In this study, focus groups were used to explore the perceptions of organic consumers, their level of knowledge concerning organic and similar “competing” products and to identify the most effective way to communicate with target groups about organic products and organic market initiatives (Zanoli et al., 2004).

The 12 focus groups were conducted in two blocks in August and November 2002 in Aberystwyth (four groups), Reading (two groups) and Lancaster (six groups) (see Table II). In total, 96 participants were interviewed, about half of whom classified themselves as regular consumers of organic food. Participants were recruited to reflect a range of characteristics: just over half were female, a third in full-time employment; a relatively high proportion had an academic education.

Participants were recruited through local contacts and were given an incentive to take part. Some participants in the Lancaster region had a higher than expected level of environmental awareness, which may be a reflection of the recruitment which was carried out in association with a particular Organic Marketing Initiative. The groups were moderated by one of the authors and another researcher from the University of Wales, Aberystwyth. All discussions groups were recorded and fully transcribed and each statement attributed to the individual person so that it could be related to the participant’s gender and frequency of purchase. The results were analysed with the help of computer software for the analysis of unstructured data.

Laddering interviews

The in-depth interview technique of laddering is frequently used in market research and has been employed in several studies to explore the consumption of organic food (e.g.

<table>
<thead>
<tr>
<th>Location</th>
<th>No.</th>
<th>Regular organic (%)</th>
<th>Female (%)</th>
<th>Children &lt; 14 years (%)</th>
<th>Full-time employed (%)</th>
<th>Academic education (%)</th>
<th>Age (years) 18-35 (%)</th>
<th>36-64 (%)</th>
<th>&lt; 55 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aberystwyth</td>
<td>28</td>
<td>86</td>
<td>46</td>
<td>29</td>
<td>21</td>
<td>64</td>
<td>36</td>
<td>46</td>
<td>18</td>
</tr>
<tr>
<td>Reading</td>
<td>18</td>
<td>50</td>
<td>56</td>
<td>39</td>
<td>56</td>
<td>61</td>
<td>28</td>
<td>39</td>
<td>33</td>
</tr>
<tr>
<td>Lancaster</td>
<td>50</td>
<td>42</td>
<td>62</td>
<td>20</td>
<td>26</td>
<td>76</td>
<td>32</td>
<td>48</td>
<td>20</td>
</tr>
<tr>
<td>Total</td>
<td>96</td>
<td>56</td>
<td>56</td>
<td>26</td>
<td>30</td>
<td>70</td>
<td>32</td>
<td>46</td>
<td>22</td>
</tr>
</tbody>
</table>

Table II.
Composition of focus groups
This method aims to uncover cognitive structures of consumers, explore the underlying values of purchasing choices, and to follow through the decision-making process by eliciting product attributes or characteristics and encouraging the respondent to reflect on why these are important to them. The basis of the laddering technique is the means-end-chain model (MEC), linking the consumer’s knowledge about product attributes with consequences and values in a hierarchical way in the form of a ladder. The structures of the chain are divided into three basic levels: attributes → consequences → values, whereby attributes can be concrete or abstract, consequences are functional or psycho-social and values are instrumental or terminal (see Figure 1).

It has been suggested that the model can be understood in terms of a problem solving process. The consumers select a course of action according to their association of products with particular attributes as a means to reach an objective or end. In other words, “product attributes (e.g. in the case of organic food, “produced without artificial chemicals”) are a means whereby consumers to obtain desired ends (e.g. “personal health”) (Gutman, 1982).

![Figure 1. Example of a means-end chain](source: Adapted from Zanoli (2004))
The present study adopted a laddering approach to shed light on core motivating values underlying purchase decisions of organic food (for further details see Zanoli, 2004). By exploring the cognitive structures, the discrepancy between positive attitudes towards organic food and actual purchasing behaviour can be better understood (Makatouni, 2002).

In all, 85 laddering interviews were undertaken in the following locations, about 80 per cent of which were recruited in predominantly urban areas:

- Aberystwyth in Wales (rural area);
- Chorley in Lancashire (market town in a post industrial area);
- Norwich (provincial city); and
- London (major metropolis).

Interviewees were chosen according to frequency of purchase (50 per cent regular buyers and 50 per cent occasional or non-buyers); area (70 per cent urban and 30 per cent rural); main place of purchase (supermarkets, direct marketing, speciality shops); and interview time (80 per cent weekdays and 20 per cent at weekends) to ensure that a variety of consumer types were represented. They were recruited through a number of routes: at random, either customers in specialist health food shops and supermarkets or passers-by in the street; and via a mail shot included in weekly boxes provided by a direct organic vegetable box scheme. The period of surveying was between January and August 2002. It was easier to recruit regular rather than occasional purchasers of organic food, and the sample is therefore biased towards them. However, results were analysed for the range of values expressed rather than their distribution in the sample-making representativeness, less important.

Motives and barriers were investigated in relation to four product categories: dairy products, fruit and vegetables, cereal products and meat. The category meat elicited a poor response and yielded insufficient data and is therefore not included in this analysis. As it was the last product to be discussed, we attribute this to interview fatigue. Other areas explored in the interviews were preferred point of purchase, understanding of certification and labelling and how the consumer relates to these issues, and finally “usage situations” i.e. in what circumstance the consumer is most likely to buy organic products.

Results
In the following section, the results of the focus groups and laddering interviews have been combined to reveal insights into consumer attitudes to organic food, highlighting different aspects that might or might not influence their decision to buy. Where possible, the responses of regular consumers (RC) and occasional consumers (OC), are contrasted with one another.

Initial associations with the term organic
All focus group participants were asked for their first association with the term organic. Participants in all six groups in Lancaster clearly associated “organic” with fresh fruit and vegetables and tended not to mention other products (meat, dairy etc.). The association of organic vegetables with soil was largely seen as positive, the proof of a genuine, wholesome and healthy product that has an “earthy feel” to it (“dirty but
pure”). Groups in Aberystwyth and Reading hardly made any spontaneous reference to product categories, but during the later discussion it became clear that they shared the strong association of organic with fresh produce.

RCs mostly mentioned abstract product related aspects that are known from other studies as first associations, such as “healthy products”, “less contaminated”, “no chemicals/pesticides”, “good taste” and “price”, but also “friendly service” and “unpackaged”. There seemed to be a shared understanding also supported by many OCs that “real” organic products are those that are home-grown.

One-third of the spontaneous associations of RCs with organics had a negative touch, in particular in relation to the high price (“expensive” but also “élitist”) and to product appearance (“a better taste, but not terribly attractive” (RC, female). In the OCs responses such negative statements clearly outnumbered the positive ones. Some stated that they are too expensive without further elaboration; others refer to uncertainty about the reliability of information received on the topic. RCs appeared more reflective on price issues; price has to be seen in context of the shopping situation and individual price perceptions.

The most significant result across all the product categories discussed in the laddering interviews was the proportion of respondents associating organic food with non-use of pesticides (seen by most interviewees as the “definition” of organic). This led to a secondary association of organic foods with “natural production” leading to the end value of “personal health” followed by “protection of the environment”. In the case of fruit and vegetables only, the ladder, “tastes good → eating to enjoy” emerged. The respondents were more articulate and engaged when discussing fruit and vegetables than any other product category which is reflected in the more complex hierarchical maps that have emerged and the strong association of organic food with horticultural products (see Figures 2 and 3). This confirms the strong first association of organic with vegetables and fruit observed in some focus groups.

**Why consumers buy organic food**

The focus group discussion guide did not contain direct questions about why participants buy organic food, but they were recorded when they came up in the discussion. Some RCs seem to take for granted that everybody is clear about the reasons for buying organic, and hence did not discuss them further. The main motives that were mentioned in the focus groups are health consciousness, the assumed higher health value, as well as social aspects like support of local farming, fair trade and – further down the scale – environmental protection.

In relation to health, two different reasons for buying organic could be distinguished; personal illness and food allergies (“my husband was diagnosed with cancer” (RC, female) and the desire to reduce the exposure to residues in a more preventative way. Particularly in the latter category, respondents admitted that they might well ignore this reason under certain circumstances. Taste was important to some and participants suggested that the organic sector should offer more taste promotions in store. Participants in the Lancaster groups also referred frequently to political motives underpinning their purchases, such as supporting the local economy and fair trade.

The laddering results revealed two major chains of association that influence consumers’ decision-making: health and concern for the environment, both of which
Figure 2.
Cognitive structure of motivations for buying organic fruit and vegetables
Figure 3. Cognitive structure of motivations for buying organic dairy products.
respondents relate directly to production methods (see Figures 2 and 3). By far the strongest reason for buying organic food was health. Interestingly, it was mostly individual health, rather than family health that was the main focus, even for parents with young children, although “buying healthy food for the sake of the children” was frequently echoed when discussing usage situations. The strongest links in the main ladders involve personal health, well-being and quality of life, which can be traced back to the intrinsic qualities of organic food, including “naturalness” in production, specifically the perceived absence of agrochemical use, health-giving properties and a sign of a positional good. The other major chain leads from the absence of agrochemicals through to a reduced impact of farming on the environment to a better environment overall. Secondary reasons for buying organic food were animal welfare (dairy products), taste (fruit and vegetables, and cereal products) and local/regional products (fruit and vegetables and, to a lesser extent, dairy products).

Environmental consciousness is relatively well developed in some sections of the population in the UK, and the character of the sample may have led to rather more emphasis being placed on this. The same is true of animal welfare, which has a longstanding profile in the UK. A minority of respondents associated organic dairy products and fruit and vegetables with local production stating that they like to buy organic because it supports the local economy and makes them “feel good”. This chain does not appear in the ladder maps for cereal products. As regards organic fruit and vegetables in particular, there was a strong association between heavy agro-chemical use and vegetable production and consequently, reducing exposure to chemicals in their diet was one of the major attributes that consumers claimed to consider when buying organic vegetables. This then taps into the desire to maximise personal health and wellbeing.

A segmentation of the laddering results revealed that households without children made clear connections to organic fruit and vegetables as a source of “enjoyment”, “good health” and “environmentally sensitive production”, whereas those with children displayed a set of interconnected values which related mostly to the health factor, indicating that more thought and effort has to be expended to tempt children into eating “healthy” vegetables. Male interviewees produced a less complex map than female, suggesting that the latter have a subtler attitude to the more extensive issues involved. Young working women and middle-aged women are among the core buyers of organic food, they are perhaps better informed and have reflected in greater depth on the issues involved. These findings reflect a fairly standard gender division of household labour, with women having more involvement in the preparation of food and family care. However, men in the UK are becoming increasingly health conscious, which emerges in the ladder-maps as a strong motivator for buying organic food.

The results confirm that consumer motivations for buying organic products vary. Health was a main reason, but also more altruistic reasons entered the discussion (e.g. “better for the environment”), especially among the more regular consumers. The results clearly illustrate that different motives and reasoning applies to different product categories. The issue of lower residues is particularly important for fruits and vegetables (where you eat the skin), but also for dairy (less drugs in animal production), leading to values of personal health considerations as well as respect for nature and the environment. For organic meat and dairy production the political value of animal welfare appears, but also the localness of the food production. The issue of
fair trade may be more important for politically motivated organic buyers of coffee or bananas, but these consumers displayed a level of confusion as to whether organic products are always fair trade.

**Important barriers**

Discussion of barriers to buying organic food revolved around the issue of price, but also covered price perception, access and availability, visual product quality and presentation, mistrust of organic food in supermarkets, eating habits and lack of cooking skills. Looking at different types of respondents a more differentiated picture emerges.

In the focus groups, the RCs in particular seemed to be more reflective on price issues. While they agreed that organic products are more expensive, they highlighted variation in premiums between different organic product categories and the places of purchase, a link with the disposable income of the household and with other food choices, such as the proportion of convenience food that is purchased. They make clear reference to value for money comparisons:

> The main important thing is quality if people can see what they are paying for and can taste the difference . . . and as with any other product they will be willing to pay slightly more for that (OC, female).

When the moderator used an indirect projective technique to elicit purchase barriers, RCs mostly reflected on habit and convenience aspects as well as lack of information about the potential benefits rather than on high price premiums. RCs also criticised a lack of choice of organic product lines and stressed that they do not want to have to make too much of an effort to buy organics. In suggesting price reductions as a supportive tool for the development of the organic market, they acknowledged the price barrier, but saw it as more important for other less frequent consumers than for themselves. Also among RCs, mistrust persisted as to whether something labelled organic actually is organic (see below).

In contrast, OCs mostly see a low food budget as the main barrier for buying organic products, but this was related to the levels of awareness about healthy eating and health issues; because they do not really know what organic means and what guarantees and personal benefits a consumer can expect from an organic product, they find it difficult to justify paying a high premium. On the question of availability, OCs simply declare that what they can get organically depends on what is stocked where they shop regularly. They also mention a mismatch with a certain culture as a potential barrier:

> I can think of certain areas where I have lived in the past where [the] culture would just not be – people would just not be into having lots of fresh fruit and vegetables and stuff, but its not a definite anti-organic thing (OC, male).

The laddering interviewees almost invariably mentioned price as a characteristic, and further probing was unsatisfactory, leading to restricted income and the need to provide household provisions from a limited budget. This more evident the less affluent the interviewee, but only slightly so.
The role of the point of sale

Responses to questions concerning retail outlets in both focus groups and laddering interviews suggest a strongly segmented population of consumers, with different retail channels being associated with different and unrelated chains.

Using projective techniques in the focus groups, RCs emphasized that convenience is an important factor that has to be considered when developing new outlets for organic products. Supermarkets appeared to have a negative connotation for some as regards the emphasis placed on cosmetic presentation and in relation to food miles. OCs primarily commented on the financial control of supermarkets: “they make the products more expensive but do not pay enough to farmers”. Some focus group participants, particularly in the Lancaster groups, expressed a preference for buying organic produce from markets and specialist shops. Some went so far as stating that they would never buy organic produce in multiples (“If my option is to buy organic from the supermarket, I have no faith in it–so I just go in and buy the regular stuff” (OC, female). However, others preferred shopping in supermarkets because of the convenience of being able to do all shopping in one place.

Although the supermarkets are cited as the main point of purchase for most respondents in the laddering interviews, some were ambivalent about them as a point of sale for organic products; a number of people expressed reservations about shopping there but admitted to doing so for the sake of convenience. There are no links through chains to terminal values suggesting that the convenience and range offered by supermarkets is relatively low down the Maslow hierarchy of needs. When asked about the least preferred place to buy organic food, only supermarkets were mentioned. These respondents expressed a lack of trust in supermarkets and also a concern about the incompatibility of marketing organic food through these outlets: “they do not support organic farming”. Specialist organic shops, on the other hand, were associated with knowledge, personal relationships and trust, while local retail outlets were strongly associated with the “feel good” factor.

When contrasting the results of regular with occasional buyers of organic products, there was evidence that regular consumers are willing to trade-off their values against the convenience and choice offered by supermarkets. Differences between rural and urban interviewees reveal a stronger inclination to buy through local or direct marketing outlets. This could simply be attributed to ease of access to such outlets in rural areas or greater affinity with food production issues. The greater ease with which urban interviewees use supermarkets may reflect the fact that in larger towns and cities the supermarket offers a more pleasant overall environment, and improved range and quality of products; supermarket strategies for smaller stores in small towns and rural areas are to carry a restricted range in a smaller space.

Contrasting the results of employed and not working groups with the medium income and low-income groups, we initially felt that there may be significant overlap between these although having rechecked the data it seems this is not necessarily the case. However, we find that the stereotype that less well-off consumers want cheap food is contradicted by the map. The ladder of avoiding anxiety by being able to trust is not as important as for the medium-high income group.

Trust builders: certification and labelling

Both focus groups and laddering interviews provided evidence of a relatively low level understanding of the organic inspection and certification systems and the legal
protection of the term organic on food products. “Is organic an actual definable term or is it just another bendable thing” (male). This was reinforced by widespread confusion about labelling issues.

The association of truly organic with home grown in the focus group could also relate to the issue of trust. Consumers feel they can only trust the quality claims if the product is almost passed over the garden fence. The high number of unprompted negative statements that OCs made could also be connected to issues of trust as well as insecurity about information received on the topic of organics in relation to GM and labelling; mistrust among RCs was already mentioned (“It is a label you can put on something and charge extra for” (male)). They demand more reassurance about truly organic quality, and suggested for this direct contact to producers, more widely available information, stricter controls (more than twice a year and unannounced inspections of farms), and rigorous enforcement of the rules to counteract fraud. Distrust is especially strong in relation to imported organic products, combined with insecurity about the equivalence of organic standards elsewhere. Most RCs seem to have greater trust in small companies working along their self-set philosophies, but for a few participants, even these businesses were not exempt from their feelings of distrust.

It proved difficult to draw out opinions around the issues of labelling and certification in the laddering interviews. Few spontaneous associations arose requiring vigorous probing and eliciting answers, which in some cases seemed forced. Most respondents were uncertain about these issues and were evidently unfamiliar with or confused by labelling. Answers revolved around the need to be able to trust both the product and any organisation responsible for validating that product. Independent organisations, with clearly defined and explained standards and information about them, were felt to be more trustworthy than a state controlled certification system. Also mentioned was the need for a “unique” or “clearly identifiable” symbol in order to simplify shopping/choosing.

Discussion and conclusions
The findings in this qualitative study illustrate some patterns and themes that appear to be in consumers’ minds when considering whether or not to buy organic food. They show a need to differentiate reasons and barriers according to product categories and provide some insights into trade-offs that consumers make between competing and conflicting values and needs.

Organic vegetables are one of the earliest recognised and the most widely available organic products and in some focus groups are the main product category that consumers associate with organic. At the same time, some respondents make reference to the health benefits of eating five portions of fruit and vegetables a day, highlighting the generally strong association between fruit and vegetables and a healthy diet. Coupled with the perception that horticultural production is characterised by high intensity and heavy use of agrochemicals, it is unsurprising that fruit and vegetables have been a major focus of attention concerning organic food and the available range continuous to grow. For many consumers these are the sole or major focus of their “organic experience” and they have indeed been described as a “key entry point” for most organic shoppers, who subsequently might move on to other categories, such as eggs and dairy, grocery products, meat and soft drinks (SA, 1999, 2000, 2001, 2002,
2003, 2004). Their importance is reflected in a higher than average share of organic sales in the vegetable sector (3 per cent compared 1.05 per cent organic share of total retail sales (Firth et al., 2004)). However, in the UK organic market, fruit and vegetables are among those product categories that are characterised by high dependency on imports (76 per cent compared to the average of 56 per cent imports across all product categories; (SA, 1999), indicating a clear mismatch between the importance of horticulture in UK organic production compared with consumer expectations.

Our results confirm that health is an important but not the only motive for buying organic food. In relation to health both personal experience with ill health and more general concern about healthy eating and health promotion could be observed. The former is likely to be stable irrespective of external determinants, whereas the latter is more likely to be affected by overall trends in consumption. Most consumers express more than one motive for buying organic and our results confirm the presence of “food as enjoyment” and also more altruistic concerns; concern for the environment and animal welfare and more “political” motives such as support for the local economy and “fair trade” are other drivers. There is indication that the importance of drivers may vary for different product categories.

Consumers are ambivalent about point of sale. This may reflect the increasingly successful profile of multiple retailers in the UK, which, in the last few years, have committed themselves to an extensive organic range. Supermarkets are clearly by far the most dominant place of purchase for organic food and may now be crowding out small organic shops in a manner similar to other independent small retailers, although direct sales of organic products have increased over the last two years (SA, 1999). Trust emerges as an important factor in deciding where to buy organic food and our results suggest that consumers have less trust in supermarkets and large corporations. The higher trust of specialist organic or local shops over supermarkets may be a reflection of wider anxieties about the food system. Interestingly, none of those who express a preference for shopping at supermarkets reach the “value level” in the ladder maps. This is true regardless of income, gender, frequency of purchase, rural/urban, etc. and suggests that supermarkets, as a point of sale, serve a purely functional purpose and unlike local, specialist shops, do not tap into or fulfil any deep desires or aspirations. Regular consumers of organic food, whose choices tend to be more value laden, are willing to enter into a process of negotiation with themselves and, according to circumstance, sacrifice these values to the convenience of the one-stop shop. However, in everyday life the convenience of shopping in a supermarket often wins out.

Although data on regional variations exist in relation to frequency of purchase and availability, few studies investigate consumer attitudes and awareness in the different regions, and how these may influence buying behaviour. With increasing amounts of organic food being sold and bought through direct sales, it would be interesting to explore the competing consumer discourses of local and organic food and how, if at all, this could impact on the production and consumption patterns for organic food at a local level.

Our findings confirm the significance of price as a barrier. Other consumer research suggests that, as supermarkets compete to reduce prices for organic products, the overall importance of price as a barrier is decreasing (Reuters, 2002). However, a marketing structure that inherently leads to an erosion of the organic price premium
may dilute the incentives for farmers to convert or stay in organic production in the UK and risk jeopardising the potential of the market to take proper care of environmental and ethical demands, thereby undermining the uniqueness of the product and one of its key selling points.

Our research further indicates that price is not an absolute barrier but only one factor in the complex decision-making process that underlies purchasing decisions. Consumers consider price in the context of disposable income, but also “value for money” and need to feel in a position to justify a premium through other gains to be willing to pay a higher price for organic products.

Consumers are faced with an almost bewildering array of choices and decisions when buying organic food. Lockie et al. (2002, p. 37) refer to competing and conflicting discourses that revolve around consumer motivations (environment, health, food production, nutrition, etc.) as well as competing desires, needs and preferences. Add to this mix the vast array of products (organic and non-organic) that are available today with their competing and sometimes conflicting marketing messages and associations of relative “value” targeted across all segments of society then it is not surprising that the consumer is confused. In relation to organic products our research indicates that there is a lack of knowledge about certification and labelling and about the guarantee that organic standards really offer to consumers. By implication, many of these consumers will lack confidence when it comes to claims made about organic food that ultimately will prevent them from buying it. An observable link between organic consumption and education could indicate that only those consumers who have attained a certain level of education have the confidence to negotiate conflicting claims and counterclaims in relation to organic food (Lockie, 2002).

Beyond the two poles of the converted (regular consumers) and the sceptical non-consumers who would never consider buying organic, there is a large body of consumers who buy organic food on a more occasional basis, but lack the knowledge, financial resources, conviction, or simply the inclination to buy more regularly. It appears that so far, attempts to communicate the need for premiums as a result of higher production costs have not reached these occasional consumers. If the industry wants to attract new consumers then they need to pay attention to the body of occasional buyers and communicate clearly the benefits of different categories of organic food to a wider audience.

Conclusions
Qualitative studies of this kind can provide important insight into the way consumers are willing to enter into trade-off between values when they make an actual purchasing decisions.

Fruit and vegetables, generally associated with a more healthy diet, are the first and in many cases the only experience of consumers with organic food. This stands in contrast to the low level of UK-grown organic fruit and vegetables.

Price remains a barrier for many consumers, but it is possible that its significance could be diminished, were consumers to be made more aware of the reasons for the higher price and convinced that organic food is a value for money choice despite the premium.

The importance of motives and barriers appears to vary between different product categories and future research should focus on product segmentation.
The complexity of consumer decision making is illustrated by their ambivalence in relation to points of sale and our results suggest that consumers opt often but not always for convenience rather than the more value laden choices which they are confronted with when shopping in smaller shops or farmers’ markets, for example. Further research could explore other value trade-offs that consumers make, for example between the potentially conflicting values of local and organic food.

Note

References
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